

**PERFORMANCE STANDARD 24(C)**  
**SUPPORT STAFF PERFORMANCE STANDARDS**  
**Adopted November 30, 2001**

**I. The Purpose of these Standards**

In coordination with the managing attorney and other support staff members of his or her office or unit, support staff members are responsible for directly assisting legal staff in serving clients. This includes acting as an intermediary between program staff and the client and professional community, as well as the successful final production of documents, and completion of other tasks, necessary to achieve the objectives and goals of the program. These standards attempt to chart performance standards for support staff who are able, in an effective and efficient manner, to facilitate advocacy carried out by legal staff and the completion of administrative tasks necessary for the smooth functioning of a regional office. These standards reflect the program's commitment to build an infrastructure that will better serve clients by retaining committed and competent staff.

**II. Expectations of All Support Staff**

**A. Client Relations**

**1. Establishing an Effective Relationship With the Client**

- i. The support staff member treats the client courteously and sensitively, establishing an effective relationship with the client.
- ii. The support staff member shows the program's respect for clients by promptly answering phones and returning phone calls.
- iii. The support staff member treats the client respectfully and appropriately, avoiding being short tempered, rude, abrupt, hostile, or condescending and not talking inappropriately or disrespectfully about clients.
- iv. The support staff member dresses appropriately while representing the program and when clients may be present.
- v. The support staff member seeks to preserve the goodwill of those who are denied service by being attentive to client's concerns, providing accurate reasons for the denial and appropriate referrals.

**2. Preserving Client Confidences**

- i. The support staff member does not leave files exposed on any desk that is in a public area or in an area where information confidential to the client may be disclosed to other than program staff.

- ii. The support staff member does not reveal to unauthorized persons or agencies the fact that the program is representing a client.
- iii. The support staff member does not discuss client cases among program staff when there may be other clients or non-program individuals present.
- iv. The support staff member avoids social gossiping about clients, and outside of the program, does not discuss cases or legal work for the program in a way that might reveal the identity or confidential communications of clients.
- v. The support staff member does not leave files exposed on any desk that is in a public area or in an area where information confidential to program personnel or issues may be disclosed.
- vi. The support staff member does not discuss confidential or sensitive personnel or program issues in the presence of others.

### 3. Promoting Program Stature and Credibility

- i. The support staff member shows an awareness of the need for BayLegal to maintain constructive, professional working relationships and a reputation for high quality services with potential clients, accepted clients, the courts, administrative agencies, vendors, and associated counsel and all other entities with which the program has a professional relationship.
- ii. The support staff member demonstrates a professional commitment to high quality in the preparation and processing of all documents and correspondence, as well as in all verbal communication.

## B. Performance Standards Related to Office Policies and Procedures

### 1. Contribution to the Program's effectiveness and efficiency

- i. The support staff member is conscientiously punctual and demonstrates regular and dependable attendance.
- ii. The support staff member has demonstrated an ability to interact and communicate effectively with differing personality styles among staff.
- iii. The support staff member demonstrates an active involvement in the development of office policies and procedures, and the resolution of office problems.
- iv. The support staff member abides by the highest standards of truthfulness in dealings with program supervisors and co-workers.

- v. The support staff member shows interest in and commitment to improving the quality and quantity of his or her work.
- vi. The support staff member shares work experiences as appropriate, and expertise, with other staff and is available for consultation about his or her skills and knowledge.
- vii. The support staff member is willing to accept supervision and direction from others as appropriate and to super-vise or assist others as needed.
- viii. The support staff member accepts constructive criticism and supervision and shows a willingness to revise written work product or modify or acquire necessary technical skills according to suggestions received.
- ix. The support staff member is reliable and timely in returning telephone calls.
- x. The support staff member may occasionally work more than the scheduled number of hours and must always do so when required by job responsibilities.
- xi. The support staff member works effectively with and develops good working relationships with other members of the staff.
- xii. The support staff member is always courteous to other support staff members, refrains from gossiping about staff or clients; and works collaboratively with other support staff members as appropriate.
- xiii. The support staff member actively participates in program activities.
- xiv. The support staff member regularly attends staff meetings.

## 2. Commitment to Professional Development and Competence

- i. The support staff member is expected to perform at a high level of effectiveness and efficiency, and to produce high quality work.
- ii. The support staff member is expected to perform at a level that is commensurate with his or her years of experience, steadily improving the quality of his or her basic skills, and, over time, working more independently and with minimal supervision.
- iii. The support staff member is expected to take advantage of relevant available training opportunities.
- iv. The support staff member is expected to be computer literate, competently using word processing, case management, e-mail, internet search engines, and other programs which are integral to the functioning of the program and office, and to his or her

specific job duties. Secretarial staff in particular will also be able to use court form programs, brochure and leaflet production software, and scanning software.

- v. The support staff member is expected to be proficient in the use of office machines, including printers, photocopiers, telephone systems, facsimile transmission, and postage meters.
- vi. The support staff member demonstrates a basic understanding of, and complies with, client eligibility and case acceptance guidelines, and other program policies, including the collective bargaining agreement, sexual harassment prevention policy, applicable time keeping requirements, relevant grant reporting requirements, etc.
- vii. **Legal Secretaries:** Where a substantial proportion of job duties are legal secretarial, the support staff member competently and efficiently:
  - (1) composing and proofreading simple letters and routine legal documents, and typing at least 50 words per minute without mistakes,
  - (2) preparing pleadings (including checking compliance with court rules) and legal documents,
  - (3) maintaining client files when assigned,
  - (3) delivering and serving documents where appropriate,
  - (4) scheduling appointments and office meetings, and making business travel arrangements,
  - (5) maintaining the office's library,
  - (6) sort and distribute the office's mail,
  - (7) file documents with courts or agencies,
  - (8) appropriately enter information into, and correct or update, the office's case management, calendaring and case tickler systems,
  - (9) transact routine office business such as banking, petty cash, utilizing the client trust account, and purchasing supplies, and
  - (10) anticipate and appropriately address office needs such as staffing shortages, supply needs, and equipment maintenance and repair.
- viii. **Reception, Information and Referral:** Where a substantial portion of job duties are reception, screening and referral related, the support staff member competently and efficiently:
  - (1) appropriately fields a large volume of telephone calls,

- (2) greets clients,
- (3) screens clients for eligibility and legal problem,
- (4) makes appropriate and effective referrals and updates referral databases when necessary,
- (5) schedules client appointments, and
- (6) opens and closes files in the case management system

ix. **Bilingual Staff:** Support and other staff receiving a bilingual stipend are fluent in the language for which a stipend is received, and will competently and efficiently:

- (1) translate orally between English and the particular language(s),
- (2) translate written materials, including letters, declarations, memoranda, and client education brochures, if receiving the stipend for written translation.
- (3) demonstrate cultural competency in interacting with clients.

#### C. Performance Standards Related to Facilitating the Work of the Office or Unit

- 1. The support staff member executes his/her duties to achieve the objectives and goals of the office, and consistent with any applicable workplan adopted by the support staff member's unit or office.
- 2. The support staff member consistently meets assignment deadlines.
- 3. The support staff member actively keeps advocates informed of the progress of work assignments, and notifies the supervisor as soon as it becomes evident an important deadline may be missed unless adjustments are made.
- 4. The support staff member notifies the supervisor when s/he is available to provide assistance to others, and cooperates in providing information about his or her workflow.
- 5. The support staff member actively contributes to the well functioning of the office, and the implementation of any office or unit workplan, by suggesting improvements to office systems, logistics, schedules, and assignments.
- 6. The support staff member maintains an annual individual workplan consistent with office or department goals and objectives.
- 7. The support staff member is fully knowledgeable about and adheres to requirements of funding sources, including the Legal Services corporation, and program policies on compliance. The support staff member must recognize that

failure to follow compliance standards jeopardizes the program and service to clients.

8. Commensurate with her or his level of experience, the support staff member shows leadership within the office in carrying out goals set by the office or the program, and in meeting the professional standards expected of the support staff member.

#### D. Examples of Activities expected of Support Staff

1. All Support Staff:
  - i. Keep workstation well stocked with all necessary supplies, directories, and forms.
  - ii. Perform telephone duties.
  - iii. Greet, direct and refer clients.
  - iv. Sort, stamp, and process incoming and outgoing mail consistent with office protocols.
  - v. Participate in implementing and maintaining office docket, calendaring, and tickler systems.
  - vi. Request needed supplies, documents, and services in a timely manner from office management.
  - vii. Prioritize work assignments based upon levels of urgency.
2. Legal Secretaries:
  - i. Transcribe from tapes or dictation.
  - ii. Demonstrate proper application of grammatical, proofreading and formatting skills.
  - iii. Independently compose routine correspondence from notes or instructions.
  - iv. Prepare documents, such as legal documents and notices, from plain or corrected copy or rough drafts or marginal notes or oral or written directions.
  - v. Use available computer program techniques for the most effective final presentation of work product.
  - vi. Possess a professional level of versatility in the use of office management computer software programs.

- vii. Develop expertise with office data management systems, including maintenance and preparation of reports.
- viii. Prepare funding applications and proposals.
- ix. Use scanner technology, document assembly and document management systems, and "Mail Merge" or other word-processing tools to perform repetitive or duplicative work in the most efficient manner.
- x. Reproduce, collate and assemble documents.
- xi. Execute the efficient transmission of documents, whether by U.S. mail, other delivery vendors, fax, e-mail attachment, or other modem-assisted communications.
- xii. Maintain files in a logical, coherent manner that will easily facilitate their use by another support staff member, and organizes the materials within the files so that critical documentation contained therein can be readily found and used.
- xiii. Participate in maintaining updated pleading banks, court forms and pro per materials and other forms for office use.
- xiv. Possess and apply knowledge of technical terms, court and agency procedures, other requirements, and local practice necessary for the completion of work assignments.
- xv. Interface with process servers, as well as court and agency clerks and other administrative officers.
- xvi. Act as liaison when necessary between the client or his/her agent, and an advocate or supervisor.
- xvii. Maintain necessary journals and logs.
- xix. Assist in setting up conference rooms for meetings and preparing documents, as well as taking and producing minutes.

### **III. Expectations of a Support Staff II or a Support Staff Member with more than Five Years of Experience**

- A. A Support Staff II or a support staff member with more than five years of experience will be expected:
  - 1. To perform the duties of a Support Staff I at a higher level of proficiency and effectiveness as would be expected of a Support Staff I employee, and to improve with experience.

2. To proficiently operate office equipment, including word processors and information technology, and to improve with experience.
3. To have a high degree of familiarity with the program's case management and calendaring systems, be able to enter, correct and update data, and to regularly produce reports as necessary, and to improve these skills with experience.
4. To anticipate and appropriately address office needs such as staffing shortages, supply needs, the need to promptly file legal papers, and machinery breakdowns.
5. To act as a resource for less experienced support staff on office and program support systems, and to assist with the training of less experienced staff.
6. To demonstrate a capacity to supervise the work of other support staff members in a supportive, non-intimidating fashion, and to act as a mentor and role model.
7. To actively participate in program wide committees or projects reasonably related to the position.

B. Support Staff II or support staff with more than five years experience, whose duties substantially include legal secretarial duties, are also expected:

1. To produce a more sophisticated and ever higher level of product given their additional experience.
2. To continually improve the quality of the basic skills performed.
3. To work more independently and on ever more complex tasks.
4. Examples additional activities expected:
  - i. Type at least 75 words per minute with minimal mistakes.
  - ii. Able to transcribe from dictating machinery or tape recorders.
  - iii. Independently handle a variety of complex specialized legal clerical procedures, such as maintaining a docket of the office's court dates and administrative hearing dates and maintaining a tickler system for active legal matters.
  - iv. Type correspondence for the signature of an attorney or advocate, checking the accuracy of legal citations and quotes, as well as independently composing general or simple correspondence.



- v. Categorize and index pleadings for office pleadings bank to facilitate analysis by advocacy staff.

#### **IV. Expectations of an Office Manager**

Under the supervision of the Managing Attorney, and in addition to performing the duties of his or her primary position, the office manager is responsible for the day to day administrative functioning of the office. The Office Manager is expected to competently and efficiently:

- A. Work with the managing attorney to ensure that necessary support services are available and provided to the office's advocates and other staff on a timely basis, including reception, secretarial, interpreter/translator and process server support.
- B. Supervise and coordinate office support personnel, including translator services.
- C. Work with the managing attorney to ensure the orderly functioning of the office, including:
  - 1. Ensuring that an efficient and effective office calendaring system is in place and utilized.
  - 2. Overseeing the opening, closing, storage and retrieval of client files.
  - 3. Ensuring the integrity of the case management database.
  - 4. Overseeing the inventory and ordering necessary supplies.
  - 5. Acting as point person for the resolution of issues involving the office's telephone/fax system, photo-copier, building maintenance, office furniture, and similar needs.
  - 6. Ensuring that the office's library is maintained and current.
  - 7. Managing the office's mail, filing, case management, calendaring and case tickler systems.
  - 8. Transacting routine office business such as banking, managing the petty cash account, utilizing the client trust account, and purchasing supplies, and
  - 9. Anticipating and appropriately addressing office needs such as staffing shortages, supply needs, filing of legal papers, and equipment maintenance and repair.
  - 10. Assisting other support staff, where necessary, and performing such other duties as are reasonably related to the position.
  - 11. Acting as a liaison with the other BayLegal offices for purposes of coordinating and planning support needs on both a regional and local level.